

**CHICO MUSEUM ASSOCIATION
STRATEGIC PLANNING SUMMARY
2004**

In the spring of 2004 the Board of Directors of the Chico Museum Association committed themselves to the process of re-evaluating the Association's mission, its visions and its goals. These strategic planning sessions led the Board to sift through the member's personal assumptions, the Association's outdated objectives, the diverse needs of the two CMA sites (one recently acquired) and changes in the demographics of the community. A revised Mission emerged.

Then, using the Museum Assessment Program Professional Concerns Checklist as a guide, the Board separated the long-range planning issues into categories based on the needs and activities of operating the two CMA sites. The Board then assessed and prioritized each category within the scope of the CMA's new Mission Statement. These categories included staff, finances, facilities, collections, exhibits, education, audience and membership. Within each were goals, ranked by importance, that incorporated the strengths and weaknesses, as well as the opportunities and threats, gleaned from the many strategy sessions.

The result was greater clarity for the Board in how to address the needs and goals that were identified from the planning process. There was a clear objective that rose above all other pressing needs and became the keystone to accomplishing the other goals: to hire a full-time Executive Director.

The Board of Directors of the CMA has given extensive consideration to a variety of concerns, assessing each with the deliberation and gravity it required. Prioritizing selected goals to accomplish the CMA's mission involved focusing on both immediate needs and long-range objectives –not an easy task but one essential to the viability and success of the two CMA sites. As of November 2004, as we near the end of the search for an Executive Director, it appears that the Board and the new Director will probably embark on an even more comprehensive strategic planning process in the months ahead.

LONG RANGE PLANNING GOALS

Governance: Goal – Develop vibrant, committed and active Board.

Membership & Community Support Goal –Triple number of members within 5 years;

- Identify new ways to solicit memberships
- Pursue partners & alliances with other historical organizations
- Have articles of historical interest published in the paper on a regular basis

Audience and Public Relations Goal –Everyone in Chico will have awareness and use of Museum, and make it one of the top tourist attractions in California.

- Develop web site for greater awareness in Chico and California and keep updated with current information.
- Link web page to Chamber of Commerce and City of Chico web pages.
- Develop a general brochure within a year; distribute to appropriate locations.
- Extend open hours (both days and times).
- Work to maintain ongoing news releases about current and coming exhibits.
- Consider window displays (e.g. @Washington Mutual Bank).
- Hire at least part-time director of public information.
- Host regional museum association meetings and workshops.

Staff & Volunteers Goal –Have staff that is professional, energetic and trained

- Hire a full time Director.
- Review and improve wage scale for employees.
- Create a well-developed volunteer program, including training and recognition.

Chico Museum Association IMLS Museums for America Grant Proposal 11/04

Finance Goal – **Develop financial resources to become self-supporting through legacy giving, grants, earned income.**

- Increase membership and community financial support.
- Develop brochure about planned giving.
- Find new ways to develop legacy gifts.
- Hire staff with fundraising abilities.

Facilities Goal – **Develop all facilities to meet program needs.**

- Reevaluate use of space in Museum and/or find larger facilities for downtown museum.
- Develop off site storage facilities for preservation of collections (e.g. climate controlled).
- Pursue conversion of Patrick Ranch Maintenance Bldg into storage facility.
- Expand Patrick Ranch acreage.
- Retain integrity of historic sites and buildings.

Collections and Conservation Goal – **Develop collections significant to Chico Area history and make them accessible through up to date collections management procedures, records and policies.**

- Actively collect materials significant to Chico area history.
- Hire staff trained in collections management and preservation.
- Centralize collection storage and have climate controlled storage for all collections.
- Update record keeping methods and revise or develop policies and procedures.
- Complete Patrick Ranch Collection inventory and catalog.

Exhibits Goal – **Be a center for major historical events/exhibits**

- Maintain professional quality of exhibits.
- Develop exhibits to become a major center of region-related history/ consider increase of space for permanent history exhibit.
- Combine exhibits with programming in major festivals (Threshing Bee, Nuts, other Farm related themes).
- Curate major region-related exhibits that have intellectual integrity, content and significance.

Educational Activities Goal – **Develop outreach programs and on-site education for all (not just children).**

- Develop programming through major festivals or musicals (Threshing Bee, Nuts, other Farm related themes).
- Develop outreach programs for children, and for people who cannot come to museum.
- Improve and add to on-site education programs for children.
- Develop relationships with teachers through in-service training, etc.
- Support and encourage authors writing about history.

Purpose and planning: Goal – **Review bylaws and planning periodically.**

Success in meeting our goals:

Governance: added three new Board members, bringing business, farming and youth components to the Board.

Membership: conducted successful spring membership campaign

Audience & Public Relations: recruited retired Public Information Officer to work with press on museum events

Staff & Volunteers: Recently chose an Executive Director from 29 applicants, following a national search; brought in an AASLH workshop on Historic Site Issues and Management for 25 CMA Board and volunteers, (+5 volunteers and staff from nearby organizations). (Single organization workshop presentation was a first for AASLH)

Finance: the new director brings top-notch fund raising skills.

Facilities: developed preliminary plans for renovation of an 11,000 sq. ft. metal building for climate controlled collection storage, offices and work space. (Plans include adding an additional 750 sq. ft.)

Collections: purchased Past Perfect museum software for collection database; volunteers have inventoried and catalogued over 5,000 collection item in the Patrick Collection.

Exhibits: The Chico Museum hosted traveling exhibit "Precious Cargo", an extremely well executed exhibit on California Indian cradleboards and infant care, then installed a major in-house exhibit on Chico history featuring places now gone.

Educational Activities: partnered with Chico State and the Chico Unified school district to participate in a grant project for teachers of American History.

PROJECT NARRATIVE
PATRICK RANCH COLLECTION - INVENTORY/CATALOG PROJECT

BACKGROUND:

The Chico Museum opened in 1982 in a remodeled Carnegie library. It presents two to four complete exhibit changes each year on local history topics. The museum employs a part-time office specialist and a full-time curator who is primarily responsible for the changing exhibits.

In May 2002 the Chico Museum Association inherited from Mrs. Hester Patrick a National Trust level property of 28 acres with an English Renaissance mansion (on the National Register), outbuildings, and all contents, effecting at least a ten-fold increase of the museum's approximate 3,000 item collection. Because the Museum had emphasized exhibits, and had collected very conservatively for almost 20 years due to lack of storage space, the acquisition of the Ranch property has presented a major collection management challenge.

The Patrick Ranch is a 28 acre remnant of two historic ranches that once totaled nearly 2,000 acres and were combined through marriage and inheritance. When acquired by the Museum, the Ranch's buildings contained all existing furnishings and stored materials still in place. The Northgraves Compton House's sixteen rooms were full, and there was an 11,000 sq. ft. outbuilding also 'chock full' of furniture and equipment.

The materials are primarily from house occupancy in two generations (1896 – 1945 and 1958 – 1999), plus stored materials from earlier and contemporaneous generations (1852 – 1958) brought in 1958 from the old Patrick House 2 miles away. Additionally there are Grimm family furniture, personal effects and records from Mrs. Patrick's maternal home. Collectively, these materials span 150 years and encompass the entwined lives of three generations of several pioneer families and a German immigrant family. Included are furniture, household items, clothing and other personal effects, photographs, farm implements and records, and other documentary materials which detail life on the two connected ranches. Additionally, there is aviation history from Patrick Field, one of the area's earliest airstrips, which was on the original ranch.

The many significant topics represented in ranch history flow from the lives of: Wm. Northgraves, who left England as a boy and arrived in California before the Gold Rush, Melissa Virginia Patrick Salmon, a strong and resourceful pioneer woman who came across the plains with three small daughters and built a small empire of land holdings after her husband died, her daughter Bee who grew up a Victorian lady in an era with much different expectations of women, Bee's husband Adam Compton a hardworking and successful farmer, and finally in the 20th century, "Pat" and Hester Patrick. There are also the lives of the lesser known –the Chinese laborers who built the railroad, made the bricks to build the house, served the family as cooks and gardeners, and endured persecution during periods of anti-Chinese sentiment, the working men who supplied labor on the ranches, and, the Native Americans whose ancestral village became known as the Patrick Rancheria. (They abandoned their centuries old home site about 1880, to a changing world and the development of agriculture.)

This intriguing collection not only represents the accumulated heritage of the several related families, but contains history representative of the California story from 1849 to 1999 when Hester Patrick moved to a nursing home. In the furnishings, clothing, personal effects, photographs, correspondence, farm ledgers, personal financial records, agricultural items, and ephemeral collections are buried social and economic history, farm history, labor history, women's history, aviation history, and the history of ethnic and minority groups.

1. PROJECT DESIGN.

The Patrick Ranch Inventory/Catalog Project has the finite goal of completing inventory, cataloguing, and storage of a collection of approximately 25,000 items (some of which have already been catalogued) which contains within it information that will be the foundation of scholarship and authenticity in future interpretive programming for our historic site. It will utilize available human and other resources to maximize the use of a single paid collection specialist. The project is primarily labor intensive, but two items of technology – database software and a digital camera-- will provide the ability for the project to meet today's professional collection management standards.

In early work with the collections was found that association and juxtaposition within the house are critical to distinguishing the connections of individual items with one or another of the multiple individuals or families,

resulting in an approach resembling 'above ground archeology' in which every item is catalogued so as to be able to reconstruct provenance within the house. Cataloguing includes nearly every item found, until all can be analyzed. Working one room, closet or drawer at a time, associations are retained providing a record of the location of every item as of the terminal occupation date of 1999.

The IMLS Patrick Collection Project would provide one full time collections specialist and supplies needed to inventory, catalog and store the Patrick Collection. Funding would purchase a second copy of Past Perfect Software to allow multiple users, and acid free storage packaging materials for artifacts, textiles, and archival materials. The Collections Specialist would work alongside an experienced retired museum professional who will act as project supervisor (part-time), and in turn would help supervise a small corps of trained volunteers.

The structure and design of the project is fairly simple:

- to provide a trained collection specialist to work full time for two years on a catalogue description, record of association(s), and condition assessment of all presently uninventoried artifacts, working space by space in the Patrick Collection;
- to assess paper materials for significance and association, so they can be catalogued and stored as either archives, individually numbered documentary artifacts, or subject based standing files. [The model for the subject based file was developed in conjunction with another IMLS funded project, the Polk County Cooperative History Project, funded by IMLS through the Oregon State Library, which developed a hierarchical subject heading system for retrieval of local history collections which was created to be adapted for local history in any geographical location.
- to appropriately store all items not remaining on exhibit.
- to enter descriptions, associations, and other basic information into a Past-Perfect database along with a digital photograph of the item;

The combined inventory-catalog approach was chosen to minimize repeat handling of fragile artifacts and documentary materials. Although it is anticipated that some items eventually may be deaccessioned, it seemed important to first learn from them as much as possible. The records, along with supplemental photographs of the artifacts in their original rooms, cabinets, and drawers, would some day allow authentic reinterpretation to the year 1999, when the home was last occupied. Nearly 6,000 items have been catalogued since the Patrick Ranch was acquired. A rough estimate of the volume of material remaining to be catalogued suggests there may be about 19,000 yet to be catalogued. In addition to about 150 pieces of furniture and a full attic, the bulk of the remaining cataloguing job is the contents of nearly 200 cabinets, shelves and drawers, and at least 85 trunks, boxes and similar containers.

2. GRANT PROGRAM GOALS: The Patrick Collection Project best addresses the Museums for America goal of sustaining cultural heritage.

The Patrick Ranch located between Chico and Durham, California, is a site having multiple cultural resource components (building, landscape, archeological and historic collections). The historic collections, both in artifacts and written form, is key to understanding the entire historic site and it's role in the community, the region and the state

The Collection, as the intellectual foundation of the historic site, needs to be organized so the information it contains is accessible for research and analysis. Through direct information found therein, and through association and other clues, the collection will provide knowledge and information about the lives of the inhabitants, their associates, and the role of the two post gold rush era ranches in the history of farming in Northern California. Completing the catalog is essential to planning interpretive programs and associated site development.

The collection is figuratively a gold mine of information pertaining to pioneer, Victorian era and 20th century agricultural, social and economic life. While the site has Gold Rush associations through the original owner, it is richest in documenting the regional phenomenon of post gold-rush agricultural success, including the introduction of numerous new plants and agricultural products, and the technology that provided the ability for farmers to shift from reliance on natural water sources to irrigation farming.

Because of the Mediterranean climate in the Sacramento Valley, and the early innovative agricultural experimentation by Chico's founder, John Bidwell, the farms of the area were early producers of a wide variety of nuts and stone fruit crops including peaches, apricots and almonds. Walnuts and citrus crops were also added to the more traditional wheat, barley, milo, hogs, cattle and sheep. Peaches and lemons from the Compton farm both won prizes at national fairs and expositions such as the World's Fairs in Chicago and St. Louis.

The activities of the families represented the collection exemplify rural life in the region as well as changes taking place in the broader American culture as California developed: the Patrick family who arrived by wagon train in the 1850s, the Murdock-Compton family --poor Irish immigrants who amassed land and wealth through farming in the 19th century; and the Grimm family --German immigrants who migrated from Kansas early in the 20th century. Of the individuals represented, none were famous, but all are representative of the life and vitality and entrepreneurship of various waves of immigrants who made their way to California.

Individuals in the 'first' generation include William "Billy" Northgraves who came alone to America from England as a teen-ager in the early 1800's and built the English Renaissance mansion with gold rush money; Thomas Shelton Wright a '49er from Missouri; his sister Melissa Virginia Wright Patrick who journeyed overland in a wagon with three small girls, inherited her brother's home and land and became a successful rancher and property owner in her own right after the death of her husband six months before the birth of their last child; the first of three generations of William Garrison Patricks --a Missourian who in ten years made three trips 'across the plains' between Missouri and California, on the last bringing cattle and prize Missouri jack mules to enrich Sacramento valley stock.

In the second generation the next Will Patrick was a turn-of-the century farmer; his sister Bee, sent to "Finishing School" to be trained in Victorian era feminine skills, resisted marriage but finally married Adam Compton from a family of poor Irish immigrants who had developed wealth from land holdings and post-gold rush farming and with that wealth bought the Northgraves house and decorated it lavishly.

In the third generation, W.G. "Pat" Patrick, farmer/aviator/mechanic, continued farming, but built an airstrip on his farm in 1929 from which he flew charter flights to west coast cities and pioneered in crop dusting, and cared for his aging mother until the 1950s when he finally was able to marry the sweetheart of his youth after a 35 year courtship. His wife Hester Grimm, was a woman who exemplified the changing roles of women in the 20th century. After a lively girlhood, including romance with artist Charles Cecil Pollock (brother of famous expressionist painter Jackson Pollock) she served as caregiver to an aging mother while developing a career as secretary to a college President and director of the regional Community Concert Association. She also was very active in numerous local women's organizations and in regional historic preservation efforts.

Associated with the main characters were numerous others who represent other aspects of social history: Chinese laborers, cooks and gardeners; farm hands; farm manager's families; Mexican braceros; German Prisoner's of War; and a wealth of family relatives whose connected stories further elaborate the vitality and flavor of Northern California from 1850 through the 20th century. It is probably these less evident stories that will be most furthered by the attention to systematic record keeping and accurate descriptions of the Patrick Collection Inventory/Catalog project.

In summary, the families, the individuals, and the associated history represent numerous themes and shifts in the historic fabric of the region and the country. The information that has emerged during the initial stages of collection cataloguing is rich. It will become further developed and others equally fascinating will emerge as we catalog the remainder of the collection. Only through cataloguing and appropriate storage can we provide for retrieval and care of this rich collection. It is critical that the project be completed as soon as possible because we have limited chance to do job right. Pressures of other projects, such as ceiling repairs, necessitate that artifacts be moved from their place of origin in the house.

3. HOW THE PROJECT FITS INTO STRATEGIC PLAN AND MISSION

Excerpts from the CMA Mission say the museum "...seeks to preserve and interpret the history and culture of Chico, Butte County and northern California...acquires archives and classifies artifacts for exhibit and publishes relevant historical data..." and is dedicated to regional excellence for its audience ...and accepts the role of research, education and celebration"

A subset of this mission is the Patrick Ranch mission to "...preserve and interpret agricultural history of the Sacramento Valley, including social, cultural and economic aspects [to]... provide enrichment for all ages through education about our past."

The completion of the Patrick Ranch Collection inventory and catalog is in and of itself, a stated strategic planning goal, and provides the means for critical research that will lay the intellectual foundation to carry out both related missions. Several other strategic goals also will be facilitated by this fundamental project: development of community support through publication; resources for web site development; development of volunteer program; increasing potential for fundraising and earned income; providing support for exhibits and developing of educational programs.

The Patrick Ranch is a place where history is continually emerging as we discover the contents in drawers and attic. The history that is being unearthed in the archival and artifacts of the Patrick Ranch is many faceted and will be used as the intellectual platform to meet many goals and for a variety of interpretive and other educational activities. The topics are many, and more will emerge as we work. Immigration, Gold Rush history, women's status, the roles of ethnic minorities, economics, water issues, transportation, botany, are just some of the known themes that need to be fleshed out.

These topics flow directly from the lives of William Northgraves, who left England as a boy, arrived in California before the Gold Rush; Melissa Virginia Patrick Salmon, a strong and resourceful pioneer woman who came across the plains with three small daughters and built a small empire of land holdings after her husband died; her daughter Bee who grew up in the Victorian era with new social expectations for women; Adam Compton a hardworking, innovative and successful young farmer, in whose tradition his nephew Garrison Patrick followed. Equally important, but less visible and often unnamed, are the working men who supplied the labor on the ranches and the Chinese laborers who built the railroad, made the bricks to build the house, and later served the family as cooks and gardeners, enduring persecution during periods of anti-Chinese sentiment.

An important part of current plans are to develop programs which fits with school curriculum for 3rd through 11th grades in local, state and American history, using 'across the curriculum' activities involving science, and language arts. School classes will have the opportunity to learn about such topics as the original Valley Oak Savannah environment, the Native Americans who used the land, the Chinese (produce) Gardens, the coming of the Railroad, the choice of crops being dependant on the availability of water, the hard work of making a living on the land, the success of California agriculture, and many more.

4. STRATEGIC PLAN: PROCESS AND FINANCIAL RESOURCES

The acquisition of the Patrick Ranch created dramatic institutional change for the Chico Museum Association. Strategic planning has been done in two stages so far, each appropriate at various stages of development, and with the expectation that after an Executive Director arrives in early 2005, we will need to do yet more comprehensive planning. The inventory/catalog project is urgently needed to support the next phase of planning. It will create an information base that it will bring to the table a clearer understanding of available resources and historic information on which to base interpretive aspects of site development and other programs.

The Planning Process: In early 2002, while the Patrick estate was still being settled, plans for the property were started. A facilitated planning session was held that included members of the community, volunteers and museum Board. Among the top three priorities at that time was to complete an inventory as soon as possible. At the time, the magnitude of that task was not realized, and after spending two years cataloguing a fraction of the collection, it has become clear that the task cannot be done by volunteers alone.

Once the property was actually acquired, it was necessary to devise an entirely new governance and management structure since the previous Board's primary task had been to operate the Chico Museum in downtown Chico. Bylaws were revised during 2002. A new Chico Museum Association Board seated in early 2003 and management teams for the two facilities became "Councils" beneath the Board.

In early 2004 the Board committed themselves to the process of re-evaluating the mission, vision and goals of the entire organization including both facilities. These strategic planning sessions led the Board to sift through the members' personal assumptions, the Association's outdated objectives, the diverse needs of the two CMA sites, and changes in the demographics of the community.

Issues of long-range planning were addressed using the M.A.P Professional Concerns Checklist as a framework to comprehensively address the needs and activities of operating the two CMA sites. The result was greater clarity for the Board approaching the needs and goals that were identified. *One clear objective rose above all other pressing needs and became the keystone to accomplishing the other goals: to hire a full-time Executive Director.* As we near the end of the search process, it has been realized that a more comprehensive planning process will need to be undertaken soon.

Financial Resources: Along with the Patrick Ranch property, Hester Patrick left the bulk of her financial holdings, creating two funds: a \$1.6 million capital endowment, restricted to generate ongoing funds for the operation of the Association, and a \$1 million dollar designated fund to be used for maintenance, upkeep and historic preservation on the Ranch. These provide a solid base of funding, but certainly are not enough to sustain this property over time, particularly since at least some of the unrestricted endowment will be needed for major maintenance and facility improvements. While the 1875 mansion is still basically a sound structure, funds are being spent for deferred maintenance including repair of rotting posts, balcony and railings, repair of all the old doors and sash windows, paint, structural repair, interior lath and plaster ceiling repair, replacement of aged plumbing and electrical systems (most of which are 70 to 90 years old). Not included in the intent of that fund are salaries and many day to day operational costs.

The Association has developed a broad base of funding sources, including membership, an annual fund appeal, City T.O.T funding, a successful travel trip program, a museum store at each site, and three major fund raising events annually. Increased expenses, associated with the operation of the Patrick Ranch demand that all income sources be increased, and new income streams developed, as addressed in the strategic plan. The new Executive Director has been chosen for a high level of fundraising skill in addition to strong museum leadership qualities.

5. APPROPRIATENESS OF PROJECT FOR INSTITUTION, AUDIENCE:

The Chico region and the Northern Sacramento Valley both historically and presently, is part of a Great Central Valley phenomenon encompassing both the Sacramento Valley and the San Joaquin Valley, in which modest size cities support large agricultural areas with services and supplies. This creates an intersect of both

The basis for serving all of these audiences must come from competent scholarship using the collection resource.

As noted in the section above, it is essential that the Ranch become self-sustaining through various forms of earned income and giving, and that the vision of being a regional tourism attraction be met. The foundation of the quality interpretation and programming that will sustain us in those ways is the collection and the information which it holds. Until the collections are made fully accessible through a searchable catalog, it will not be possible to fully understand the associated history and to interpret it correctly and authentically for local audiences, other visitors or children.

There are three major target audiences anticipated for the Patrick Ranch, all of which will find programming based on the mission of agricultural history and accompanying social and economic history. First is the local audience of both urban and rural families and individuals who may most enjoy attending major events and programs. The first of those to have been implemented is the annual Threshing Bee which in it's first two years drew a total of about 5,000 visitors and has already become a noted 'not to be missed' event in the community, especially for families with children.

Second, are regional, State and National tourists, coming to first experience the magic of California's great climate and agricultural bounty, and to learn about the history of the region that is the source of specialty food products that they particularly enjoy such as almonds, walnuts, olives and kiwi fruit. This audience will take longer to develop (although there were have already been visitors from several different states and other regions of California), but the intellectual base will be the same, and will rely in the same way on accurate and authentic historical information.

The third target audience is school children and work is already in early development stages for three major projects. A large School District/University grant has set aside funding (\$6,000 per year for three years) for us to develop training and materials for teachers to help them learn to better teach American History. This project is targeted at grades 5, 8, and 11 and is in the early planning stage. A second project, to work with local teachers and curriculum coordinators for grades 3 and 4, is in the pre-planning stages, with first meetings scheduled in January 2005. Again, the collection and its content will be an absolutely critical resource for the development of these programs.

The complete inventory and cataloguing of the Patrick Collection is absolutely essential to the job of developing of the Patrick Ranch and meeting its mission to interpret agricultural and associated economic and social history.

6. PROJECT RESOURCES: TIME AND BUDGET

The presence of a collection specialist to expand the viable uses of space and volunteer help will, in combination, insure the completion of the Patrick Collection inventory and catalog. Volunteers have processed collections so far at an average rate of about 200 items a month. The Project will approximately triple the capacity to use workspace and time, so it seems to be realistic that the remaining approximate 16 - 18,000 items can processed in a 24 month period including time for photography, data entry and storage. IMLS funding will leverage an increase in the ability to utilize available volunteer resources.

The volume of cataloguing work to be done, the available volunteer supervision and assistance, and work space limitations have led to the decision to make this a two year project using one full-time paid Collection Specialist. This construct will maximize the use of volunteers. With the Collection Specialist on site five days per week additional volunteers will be able to participate. (Previously trained supervision has been available only one day per week, which did not fit the schedules of some potential volunteers.)

The major activities are: for artifacts, assigning a catalog number and attaching it to the artifact, writing initial catalog description including condition observations, taking a digital snapshot of the item, boxing it or otherwise storing it appropriately for protection until needed again. Archival materials must be assessed at to whether it is an item to be catalogued individually, grouped as an archive, or placed in a subject file folder. Significant individual items and archives will then be catalogued. Subject file materials will be organized, and

toward the end of the project subject files will be reviewed for consistency of content, cross referenced when necessary, and a list of holdings will be compiled. The defining reason for choosing not to catalog individually will be if the paper items clearly have no need to retain context or association, such as miscellaneous magazine clippings saved by the donor that have general historic research value, but no reason to retain an association with other items found in the same room. (In the home office at least 20 linear feet of paper items from the donor's various organizational associations were found in piles, mostly associated by date of abandonment.)

Since all items in a room, closet or drawer must be dealt with as they are found, the project will be simply a continuum of the above mentioned activities, progressing from room to room or space to space, based on relative urgency to process any particular space that might be based on climatic conditions (such as the attic) or on need for other uses for a space (such as kitchen cabinets).

The budget reflects that the addition of one full-time paid person will leverage additional volunteer time through providing additional trained supervision, and the supplies and equipment will be funded adequately to keep the workers supplied with cataloguing materials, acid-free storage boxes and materials, mylar sleeves for photographs and fragile documentary materials.

7. PROJECT RESOURCES: PERSONNEL AND TECHNOLOGY

Personnel: The Chico Museum Association is in the process of hiring its first Executive Director, who is expected to be in place before February 1, 2005. The Director will assume ultimate institutional accountability for oversight of this project.

Day-to-day supervision of the Project will be provided by a **Project Supervisor**, Lucy Sperlin, who has shaped the nature of the Patrick Collection work for the last 2 ½ years. Ms. Sperlin is a retired museum professional with 30 years of collection management experience including 18 years in a general museum (managing a 60,000 item collection of history, natural history and ethnography); principle staff for a multi-institution IMLS/State Library funded archival project, and as contractor with California State Parks to catalog, photograph and pack a 20,000 item collection of historic auto camping equipment and vehicles, a project which required completion in seven months. As a volunteer at the Patrick Ranch, Ms. Sperlin has been supervising six or more volunteers one full day per week. Nearly 6,000 items have been catalogued to date, and well over 2,000 entered into a Past Perfect database. If IMLS funds this project, Ms. Sperlin has agreed to commit at least 20 hours per week for two years to supervising and working on this project, to insure that the inventory and cataloging can be completed.

A **Collections specialist** will be hired for two years, with IMLS funding. This will be a new hire having both training and experience in collection management and care, registration, and related functions. The position will be recruited regionally, and the successful candidate will have excellent observational and writing skills, competent computer skills, a strong sense of historical relationships and historical significance, and a sound knowledge of artifact handling and care. (see Position Description)

Volunteers who have been cataloguing the collection over the last two years, and perhaps others, will assist the Project, providing at least an average of 24 hours per week of time (total) cataloguing or helping with data entry. These volunteers have been trained in collection handling techniques, and have developed considerable skill in descriptive cataloguing. The six regular volunteers who have been working with the collections for over two years have embraced professionalism in dealing with museum collections. They attended the AASLH 3-day workshop "Historic House Museum Issues and Operations," have learned historic house housekeeping from National Trust videos, and have begun using the web to research artifacts and solve collection care problems. Additionally, two of the volunteers attended sessions at the Western Museum Association Annual Meeting in 2003. An added plus to their commitment is their familiarity with the Patrick and Compton families (two are related to these families) and have been very helpful in providing information about the connections of artifacts to individuals and to the history of the Patrick and Compton families.

Technology: While collection cataloguing is predominantly labor intensive, two very basic kinds of technology are involved: the use of a personal computer with a Past Perfect database, and the use of simple digital camera equipment for 'snapshots' of each collection item, to be included in the database.

Project Budget Form

SECTION 1: SUMMARY BUDGET

Name of Applicant Organization CHICO MUSEUM ASSOCIATION

IMPORTANT! READ INSTRUCTIONS ON PAGES 3.4–3.5 BEFORE PROCEEDING.

DIRECT COSTS

	IMLS	Applicant	Total
SALARIES & WAGES	<u>48,000</u>	<u></u>	<u>48,000</u>
FRINGE BENEFITS	<u>13,440</u>	<u></u>	<u>13,440</u>
CONSULTANT FEES	<u>-</u>	<u></u>	<u></u>
TRAVEL	<u>-</u>	<u></u>	<u></u>
MATERIALS, SUPPLIES & EQUIPMENT	<u>3,600</u>	<u>3,600</u>	<u>7,200</u>
SERVICES	<u>-</u>	<u>77,792</u>	<u>77,792</u>
OTHER	<u>-</u>	<u>500</u>	<u>500</u>
TOTAL DIRECT COSTS	\$ <u>65,040</u>	\$ <u>81,892</u>	\$ <u>146,932</u>
INDIRECT COSTS	\$ <u>9,756</u>	\$ <u></u>	\$ <u>9,756</u>

TOTAL PROJECT COSTS \$ 156,688

AMOUNT OF CASH-MATCH \$ 4,100

AMOUNT OF IN-KIND CONTRIBUTIONS \$ 77,792

TOTAL AMOUNT OF MATCH (CASH & IN-KIND CONTRIBUTIONS) \$ 81,892

AMOUNT REQUESTED FROM IMLS, INCLUDING INDIRECT COSTS \$ 74,796

PERCENTAGE OF TOTAL PROJECT COSTS REQUESTED FROM IMLS 42.7 %
(MAY NOT EXCEED 50%)

Have you received or requested funds for any of these project activities from another federal agency?
(Please check one) ☐ Yes ☒ No

If yes, name of agency _____

Request/Award amount _____

Project Budget Form

SECTION 2: DETAILED BUDGET

Year ☒ 1 ☐ 2 ☐ 3 - Budget Period from 9/1/05 to 8/30/06


Name of Applicant Organization CHICO MUSEUM ASSOCIATION

IMPORTANT! READ INSTRUCTIONS ON PAGES 3.4-3.5 BEFORE PROCEEDING.

SALARIES AND WAGES (PERMANENT STAFF)

NAME/TITLE	No.	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
	()				
	()				
	()				
	()				
TOTAL SALARIES AND WAGES \$					

SALARIES AND WAGES (TEMPORARY STAFF HIRED FOR PROJECT)

NAME/TITLE	No.	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
	(1)	<u>\$11.53 hr. / 24,000 yr.</u>	<u>24,000</u>		<u>24,000</u>
	()				
	()				
	()				
TOTAL SALARIES AND WAGES \$			<u>24,000</u>		<u>24,000</u>

FRINGE BENEFITS

RATE		SALARY BASE	IMLS	APPLICANT	TOTAL
<u>28</u> %	of \$	<u>24,000</u>	<u>6,720</u>		<u>6,720</u>
	% of \$				
	% of \$				
TOTAL FRINGE BENEFITS \$			<u>6,720</u>		<u>6,720</u>

CONSULTANT FEES

NAME/TYPE OF CONSULTANT	RATE OF COMPENSATION (DAILY OR HOURLY)	No. OF DAYS (OR HOURS) ON PROJECT	IMLS	APPLICANT	TOTAL
TOTAL CONSULTANT FEES \$					

TRAVEL

FROM/TO	NUMBER OF: PERSONS DAYS	SUBSISTENCE COSTS	TRANSPORTATION COSTS	IMLS	APPLICANT	TOTAL
	() ()					
	() ()					
	() ()					
	() ()					
TOTAL TRAVEL COSTS \$						

Project Budget Form

SECTION 2: DETAILED BUDGET CONTINUED

Year ☒ 1 ☐ 2 ☐ 3

MATERIALS, SUPPLIES AND EQUIPMENT

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
PAST PERFECT Software	catalog price	600		600.00
DIGITAL CAMERA + peripherals	catalog price	500		500.00
SUPPLIES	catalog price	1,250	1,800	3,050.00
TOTAL COST OF MATERIALS, SUPPLIES, & EQUIPMENT \$		2,350	1,800	4,150.00

SERVICES

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
[REDACTED]	16 hr. wk @ 2800/hr.		23,296	23,296.00
[REDACTED]	5 hr. wk each = 30 hr. x 10 hr.		15,600	15,600.00
TOTAL SERVICES COSTS \$		0	38,896	38,896.00

OTHER

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
SEARCH COSTS			500	500.00
TOTAL OTHER COSTS \$			500	500.00

TOTAL DIRECT PROJECT COSTS \$	33,070	41,196	74,266
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INDIRECT COSTS

Check either item A or B and complete C. (See section on Indirect Costs, page 3.5.)

Applicant organization is using:

- ☒ A. An indirect cost rate which does not exceed 15 percent of modified total direct costs charged to IMLS.
- ☐ B. Federally negotiated indirect cost rate (see page 3.5).

Name of Federal Agency Expiration

Date of Agreement

Rate base Amount(s)

15 % of \$ 33,070 = \$ 4961

IMLS Applicant

Total

C. Total Indirect Costs

\$ 4961 \$ -

\$ 4961

Project Budget Form

SECTION 2: DETAILED BUDGET


Year ☐ 1 ☒ 2 ☐ 3 - Budget Period from 9/1/06 to 8/30/07Name of Applicant Organization CHICO MUSEUM ASSOCIATION

IMPORTANT! READ INSTRUCTIONS ON PAGES 3.4-3.5 BEFORE PROCEEDING.

SALARIES AND WAGES (PERMANENT STAFF)

NAME/TITLE	No.	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
	()				
	()				
	()				
	()				
TOTAL SALARIES AND WAGES \$					

SALARIES AND WAGES (TEMPORARY STAFF HIRED FOR PROJECT)

NAME/TITLE	No.	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
	(1)	11.53 hr / 24,000 yr.	24,000		24,000
	()				
	()				
	()				
TOTAL SALARIES AND WAGES \$					

FRINGE BENEFITS

RATE		SALARY BASE	IMLS	APPLICANT	TOTAL
28 %	of \$	24,000	6,720		6,720
%	of \$				
%	of \$				
TOTAL FRINGE BENEFITS \$					

CONSULTANT FEES

NAME/TYPE OF CONSULTANT	RATE OF COMPENSATION (DAILY OR HOURLY)	No. of Days (or HOURS) ON PROJECT	IMLS	APPLICANT	TOTAL
TOTAL CONSULTANT FEES \$					

TRAVEL

FROM/TO	NUMBER OF: PERSONS DAYS	SUBSISTENCE COSTS	TRANSPORTATION COSTS	IMLS	APPLICANT	TOTAL
	() ()					
	() ()					
	() ()					
	() ()					
TOTAL TRAVEL COSTS \$						

Project Budget Form

SECTION 2: DETAILED BUDGET CONTINUED

Year ☐ 1 ☒ 2 ☐ 3

MATERIALS, SUPPLIES AND EQUIPMENT

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
SUPPLIES		1,250	1,800	3,050.00
TOTAL COST OF MATERIALS, SUPPLIES, & EQUIPMENT \$		1,250	1,800	3,050.00

SERVICES

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
[REDACTED]	16 hr. wk (28 hr.)		23,296	23,296
[REDACTED]	5 hr wk each = 30 hr. wk x 10 hr.		15,600	15,600
TOTAL SERVICES COSTS \$			38,896	38,896.00

OTHER

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
TOTAL OTHER COSTS \$				

TOTAL DIRECT PROJECT COSTS \$	31,970	40,696	\$ 72,666
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INDIRECT COSTS

Check either item A or B and complete C. (See section on Indirect Costs, page 3.5.)

Applicant organization is using:

- ☒ A. An indirect cost rate which does not exceed 15 percent of modified total direct costs charged to IMLS.
- ☐ B. Federally negotiated indirect cost rate (see page 3.5).

Name of Federal Agency Expiration

Date of Agreement

Rate base Amount(s)

15 % of \$ 31,970 = \$ 4,795

IMLS Applicant

Total

C. Total Indirect Costs

\$ 4,795 \$ -

\$ 4,795

BUDGET JUSTIFICATION

Staff & Services

The Patrick Collection Inventory/Catalog Project is labor intensive, so most of the grant funding as well as in-kind contributions falls in these areas. Both have been budgeted very conservatively based on local and regional pay for a comparable level of expertise and experience in a region where living costs are relatively high.

Cataloguer. The Chico Museum Association is requesting two years salary and payroll expenses for a Project Cataloguer. The salary was determined by local and regional salaries for similar positions, \$24,000 per year. (About \$11.61 per hour). The person hired into this key project position will be responsible for working along with the project manager for completing the project (with the additional help of volunteers). Payroll taxes and other employee benefits are currently 28% for present staff, so the same percentage was used to budget benefits for this position.

Project Manager. The CMA is fortunate in having a retired museum professional (volunteer) to serve as Project Manager. An In-kind contribution of \$28 per hour has been budgeted for the Project Manager's salary, comparable to similar pay regionally, although is considerably lower than her most recent contract which paid \$40 per hour. Her experience and skills will insure the maintenance of a professional level of work from all other participants. She will train participants, spot check all work, including data entry, for consistency, for maintenance of provenance and human association information in the catalog, and for a high level of care in storing artifacts. While she is presently volunteering about 12 hours per week to collection management, she has agreed to raise this commitment to 16 hours per week if IMLS funding will provide a full-time cataloguer for the project.

Volunteers. It is expected that six volunteers or more will work an average of 5 hours per week each, if not more. The value of their time is at least \$11 per hour. There currently are 4 – 6 volunteers working one or two days per week. It is expected that when the Project Cataloguer is available to supervise additional days, more volunteers will be able to work, so it is likely that volunteer in-kind contribution to the project may actually exceed what has been budgeted. Work space currently is a limitation, and spreading the work to more days will allow us to maximize space use.

Equipment

Two critical items of equipment support the Inventory/Catalog project. A second copy of Past Perfect software will be necessary to allow us to have multiple users. As AASLH members we will be eligible for the member's discount.

A digital camera will be purchased because currently digital photography of artifacts has been relying on the personal cameras of volunteers (all minimum 4 megapixels). \$500 has been budgeted, for a good quality 5 megapixel camera and a downloading connector to the USB port.

Materials and supplies.

While the Patrick Collection cataloguing project is primarily staff intensive, adequate supplies for cataloguers to work with are critical for the project to meet its goals. These will include such items as cataloguing supplies – identi-pens and B-72 solution for marking; acid-free tissue, file folders and boxes of various sizes; mylar sleeves and other document protection containers; cloth tape; roll mylar and tape to encapsulate large documents; and individual sized-to-fit folded boxes for fragile books. Other as yet unknown storage supplies will probably also be needed, to be determined as we progress with the project. These supplies are expected to cost at least \$3,000 per year, in keeping with what has been spent in the last two years for similar collection needs.